

Support Coordination caseload and record

Find a participant on the Support Coordination caseload, add one, read their coordination record, add a task and change who coordinates their supports.

WHO IT IS FOR Owner, Admin, Manager, Coordinator	TIME NEEDED About 14 minutes	LAST REVIEWED 14 October 2026
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Who this is for

Permissions: To open Support Coordination and read a participant's record you need **Can view support coordination**. To add a participant, change a coordinator, add or change tasks and goals, log activities, and add referrals and reports, you also need **Can manage support coordination**. Without it you see the same screens with the buttons that save things left out. If **Support Coordination** is missing from your left menu, ask an Owner or Admin to check your role.

Before you begin

- The participant already exists as a client and is active. See [Create a client](#).
- The person who will coordinate their supports is an active staff member. See [Create a staff member](#).
- For the budget to show, the participant has an active Service Agreement with line items. See [Create a Service Agreement](#).



Steps

1 Go to **Support Coordination** > a participant in the **Caseload** list

Support Coordination keeps a participant's plan budget, activities, tasks, goals, referrals and reports in one place. The **Caseload** list is on the left. The participant you choose opens on the right.

- 1 In the left menu, under **Operations**, choose **Support Coordination**.
- 2 **My caseload** lists the participants you coordinate. **All participants** lists everyone on the caseload. The number in brackets is how many people each holds.
- 3 Type part of a name in **Search participants...** to narrow the list.
- 4 Tick **Include inactive** to also list participants who were taken off the caseload.
- 5 **Add participant** adds someone new. The third step covers it.
- 6 Choose a participant's row to open their record.

The screenshot displays the BondiByte Support Coordination interface. On the left is a dark blue sidebar with a 'WORKSPACE NAVIGATION' menu. Under 'OPERATIONS', 'Support Coordination' is highlighted with a blue circle and the number 1. The main content area is titled 'Support Coordination' and includes a sub-header 'Manage your participant caseload and coordination activities.' Below this is a 'Caseload' section with two tabs: 'My caseload (1)' and 'All participants (5)'. A search box labeled 'Search participants...' is marked with a blue circle and the number 3. Below the search box is a checkbox for 'Include inactive' marked with a blue circle and the number 4, and a blue button '+ Add participant' marked with a blue circle and the number 5. A list of participants follows, with 'Noah Bennett' selected and highlighted with a blue circle and the number 6. The right side of the interface shows the record for Noah Bennett, including his status (Active), NDIS number, DOB, location, and coordinator (Emma Clarke). It also displays key metrics: a budget of \$365,464.41, 1 open task, 1 open referral, and 198 days remaining in the plan. A 'Plan summary' section on the right provides details about the plan start/end, coordination level, coordinator, and budget breakdown.

Choose **Support Coordination** in the left menu (1), then use the caseload scope buttons (2), the search box (3), **Include inactive** (4) and **Add participant** (5). Choose a participant's row (6) to open their record.



2 Know what the caseload list shows

Owners, Admins and Managers usually open on **All participants**. A coordinator whose role is limited to Support Coordination opens on **My caseload**. Whichever you choose, the participant whose record is open is highlighted in the list, and the search and **Include inactive** apply to both lists.

Each row shows the participant's initials and name, their coordination level (or **Level not set**), and either **Plan ends** with the date, what is left of the budget, or **No funded supports yet**. A grey **Inactive** label marks someone removed from the caseload. An amber **Unassigned** label means nobody coordinates them yet.

A row with no plan end date but a budget shows what is left, such as **\$1,000.00 remaining of \$2,000.00**. The numbers in brackets on **My caseload** and **All participants** follow your search and **Include inactive**, so they always match what you see.

If nobody matches your search, the list says **No participants match** and what you typed, and **Clear search** brings everyone back. With nobody on the caseload it says **No participants yet**, and under **My caseload** it suggests switching to **All participants**. The list shows 50 people at a time. **Rows**, **Back** and **Next** under it show more. On a narrow screen the list and the record take turns on the screen.



3 Add a participant to the caseload

A participant joins the caseload when you choose who coordinates their supports. Choose **Add participant**. The **Add participant** window opens.

- 1 In **Participant**, search for the client and choose them. Only active clients who are not already on the caseload are listed. To add someone who is not listed, create them as a client first.
- 2 In **Coordinator**, search for the staff member and choose them. Only active staff are listed.
- 3 In **Support Coordination level**, choose **Support Connection**, **Coordination of Supports** or **Specialist Support Coordination**.
- 4 Choose **Add to caseload**. It stays greyed out until all three are filled in. A message confirms **Participant added to the caseload**, and the record opens. **Cancel** closes the window without adding anyone.

Note: A participant needs a coordinator before you can log an activity or send an email for them. Adding them with a coordinator takes care of that.

The screenshot shows the 'Add participant' window. At the top, the title 'Add participant' is followed by a subtitle 'Add a participant to the Support Coordination caseload and choose who coordinates their supports.' and a 'Close' button. Below this are three input fields: 'PARTICIPANT *' with a search bar 'Search participants...' (callout 1), 'COORDINATOR *' with a search bar 'Search staff...' (callout 2), and 'SUPPORT COORDINATION LEVEL *' with a dropdown menu 'Select a level' (callout 3). At the bottom right, there are two buttons: 'Cancel' and 'Add to caseload' (callout 4).

Choose the participant (1), the coordinator (2) and the Support Coordination level (3), then choose Add to caseload (4).



4 Read the participant header

The header stays on screen on every tab, so you always see who you are working on.

- 1 **Back to caseload** returns you to the list. On a narrow screen it switches from the record to the list.
- 2 The plan pill reads **Plan ends** with the date and the days left. It turns amber at 60 days or fewer and red once the plan has ended. It reads **No plan end date** when there is no funded plan.
- 3 The name is followed by **Active**, or **Inactive** for a participant removed from the caseload.
- 4 The line under the name shows the coordination level, **NDIS No.**, **DOB** and the suburb and state. Each part shows only when it is recorded on the client's record.
- 5 **Coordinator:** shows who coordinates the participant, or **Unassigned**.
- 6 **Log activity** and **Add task** are quick actions, and the three-dot button opens the header menu. These three show only when you can manage support coordination.

Note: **Log activity** opens the Activities tab with the form ready. See Log activities, referrals and reports.

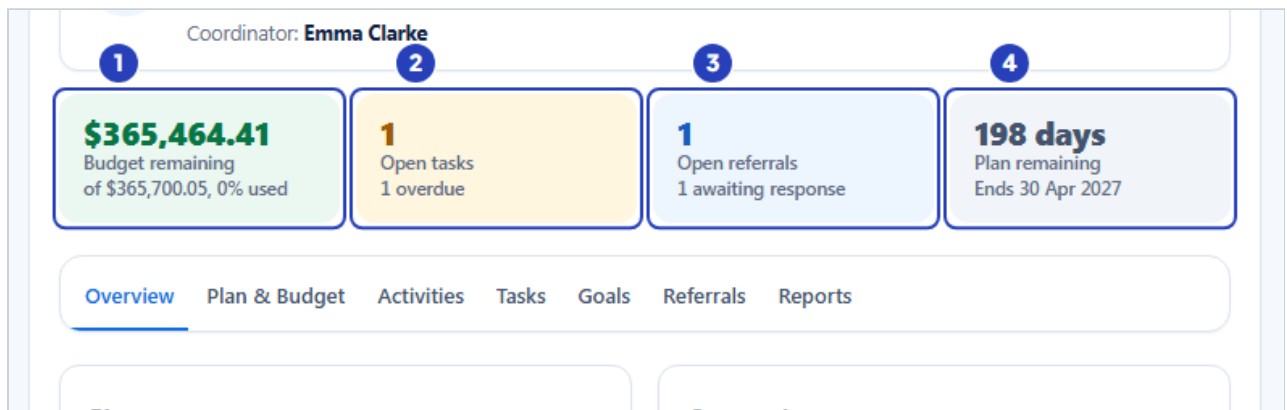
The header holds *Back to caseload* (1), the plan pill (2), the name and status (3), the identity line (4), the coordinator (5) and the action buttons (6).



5 Read the four tiles

The tiles show the state of the plan at a glance and update as soon as you save a change.

- 1 **Budget remaining** is the money left across the participant's funded supports, with the total and the **% used** under it, or **No funded supports**. It is green normally, amber once 85% is used and red when the budget is over.
- 2 **Open tasks** counts tasks that are not completed or cancelled, with how many are **overdue** under it. The tile turns amber when any are overdue.
- 3 **Open referrals** counts referrals that are not accepted, declined or closed, with how many are **awaiting response** under it. That count includes referrals marked **Sent**. The tile turns blue when any are waiting.
- 4 **Plan remaining** is the days until the plan ends, such as **198 days**, then the end date. It reads **Ended** after the end date and **No plan** when there is none. It follows the colours of the plan pill.



Budget remaining (1), Open tasks (2), Open referrals (3) and Plan remaining (4).



6 Read the Overview tab

The record opens on the **Overview** tab. The tab strip has seven tabs: **Overview**, **Plan & Budget**, **Activities**, **Tasks**, **Goals**, **Referrals** and **Reports**. The Overview only shows the latest of everything.

- 1 **Plan summary** lists **Plan start**, **Plan end**, **Coordination level**, **Coordinator**, **Total budget**, **Used** and **Remaining**. **Remaining** turns red when the budget is over. **View plan & budget** opens that tab.
- 2 **Open tasks** shows up to five open tasks with the due date, a priority label and a status label. A task past its due date shows **Overdue**.

The Plan summary (1) and Open tasks (2) cards at the top of the Overview tab. The other cards are below them.

7 Read the rest of the Overview

Scroll down for four more cards. **Recent activities** shows the latest five, newest first, as the type and subject, then the date, the minutes and **Billable** or **Not billable**. **Active goals** shows goals that are not started or in progress, with the target date, the latest progress note and a status label.

Open referrals lists referrals still open, with the provider, the service type, the follow-up date and the status. **Reports** lists the latest stored reports with the date created and the status **Final**. An empty card says so, for example **No activities logged yet.** or **No reports yet.**

Every card has **View all**, which opens its tab. Most also have a plus action: **+ Add task**, **+ Log activity**, **+ Add goal**, **+ Add referral** or **+ Create report**. It opens the same form as the matching tab and shows only when you can manage support coordination.



8 Check the budget on the Plan & Budget tab

Choose the **Plan & Budget** tab to see where the participant's money is going. It only shows figures. The budget comes from the participant's active Service Agreement.

- 1 Four tiles repeat the money: **Total budget**, **Used**, **Remaining** and **Utilisation**, which shows the percentage used with a bar.
- 2 **Create claim** gathers the billable activities that are not claimed yet into one claim.
- 3 **Download claim CSV** saves the claim as a file you can review and lodge yourself.
- 4 The **Budget breakdown** table lists each funded support and what has been used against it.
- 5 **Coordinator history** records who was assigned, changed, removed or made inactive, and when. In its corner, **Edit coordination details** is a shortcut to the window described under the header menu, and shows only when you can manage support coordination. **Show history**, with the number of changes in brackets, lists every change and then reads **Hide history**.

BondiByte

WORKSPACE NAVIGATION

PLATFORM

- Dashboard

OPERATIONS

- Clients
- Staff
- Rostering
- Sites
- SIL/Smart Rostering
- Approvals
- Timesheets
- Invoicing
- Support Coordination**

REGISTERS

- Service Agreements
- Staff Contracts
- Documents
- Reports
- Charts

Support Coordination

Chloe Davis
CD Specialist Support Coordination
Plan ends 30 Apr 2027

Daniel Mensah
DM Support Connection
Plan ends 19 Feb 2027

Grace O'Connor
GO Coordination of Supports
Plan ends 30 Apr 2027

Noah Bennett
NB Coordination of Supports
Plan ends 30 Apr 2027

Rows 50

Back 1-5 of 5 participants Next

1 **\$365,700.05** Total budget

2 **\$235.64** Used

3 **\$365,464.41** Remaining

0% Utilisation

Budget breakdown
Funded supports from the participant's service agreements, with what has been used against each.

2 Create claim

3 Download claim CSV

SUPPORT ITEM	CATEGORY	BUDGET	USED	REMAINING	% USED
Assistance With Self-Care Activities - Standard - Weekday Night 01_002_0107_1_1	Assistance with Daily Life (Includes SIL)	\$131,492.91	\$157.62	\$131,335.29	0%
Assistance With Self-Care Activities - Standard - Public Holiday 01_012_0107_1_1	Assistance with Daily Life (Includes SIL)	\$97,624.85	\$78.02	\$97,546.83	0%
Assistance With Self-Care Activities - High Intensity - Sunday 01_403_0104_1_1	Assistance with Daily Life (Includes SIL)	\$136,582.29	\$0.00	\$136,582.29	0%

Rows 50

4 Back 1-3 of 3 support items Next

Manage funded supports →

5 **Coordinator history**
Who was assigned, changed, removed or made inactive, and when.

Edit coordination details

Show history (2)

2 changes recorded. Latest: Support coordinator changed (10 Sept 2026, 07:48 pm).

The budget tiles (1), Create claim (2), Download claim CSV (3), the Budget breakdown table (4) and Coordinator history (5).



9 Read the budget table and the claim buttons

In the **Budget breakdown** table, **Support item** gives the support's name and code. **Category** shows only when at least one support has a category. **Budget** is the money set aside in the Service Agreement. **Used** is the value of the billable activities logged against it. **Remaining** is Budget less Used, in red when a line is over budget. **% used** is Used as a percentage of Budget. **Manage funded supports** below the table opens the participant's agreements.

Create claim opens a window titled **Create claim?** that shows the amount and the number of activities. Claimed activities are locked and can no longer be edited or deleted. A message then confirms **Claim created:** with the amount and the number of activities. If there is nothing to claim, a message says **There are no unclaimed billable activities to claim.** **Download claim CSV** confirms **Claim CSV downloaded.** BondiByte does not send claims to the NDIA. You lodge the file from **Download claim CSV** yourself.

Coordinator history says how many changes are recorded and the latest one, or **No coordinator changes recorded.** when there are none. **Show history** lists them all with the time and who made each change, and then reads **Hide history.** Choose **Hide history** to fold the list away again. **Edit coordination details** in the same corner opens the same window as the header menu item of that name, so you can change the coordinator or the level without opening the header menu. If the tab says **No funded supports recorded for this participant.,** the participant has no active Service Agreement with line items yet. See Add line items.



10 Add a task

Tasks are the follow-ups for a participant and who is responsible for each. Choose **Add task** in the header, **+ Add task** on the Overview, or **Add task** on the **Tasks** tab. The **Add task** window opens.

- 1 In **Task**, type what needs doing. This is required.
- 2 In **Assigned to**, choose the staff member responsible. It starts as the participant's coordinator. This is required.
- 3 In **Due date**, choose a date if there is one. It is optional. An open task is overdue the day after its due date.
- 4 In **Priority**, choose **Low**, **Normal** or **High**. It starts as **Normal**.
- 5 In **Status**, choose **Open**, **In progress**, **Completed** or **Cancelled**. It starts as **Open**.
- 6 Choose **Add task**. It stays greyed out until **Task** and **Assigned to** are filled in. A message confirms **Task added**.

Notes is optional. Add anything the assignee needs to know.

Type the task (1), check who it is assigned to (2), choose a due date (3), the priority (4) and the status (5), then choose Add task (6).



11 Read the Goals tab

Goals record what the participant is working towards.

- 1 **Add goal** opens the goal form.
- 2 The table shows each **Goal**, its **Target date**, its **Status** and the **Latest progress** note. With no goals it says **No goals recorded yet.** and **Add a goal to track what the participant is working towards.**
- 3 A goal's three-dot menu has **Edit**, **Mark achieved** and **Delete**.

The screenshot displays the 'Support Coordination' interface. On the left is a sidebar with 'BondiByte' logo and navigation links. The main area is titled 'Support Coordination' and includes a 'Caseload' section with a list of participants (Amelia Watson, Chloe Davis, Daniel Mensah, Grace O'Connor, Noah Bennett) and a 'Goals' section. The 'Goals' section features a table with the following data:

GOAL	TARGET DATE	STATUS	LATEST PROGRESS
Prepare for Noah's plan review Go through each funded support with Noah and his family and note what to keep, change or add.	26 Feb 2027	Not started	No progress note yet
Build confidence using public transport independently Noah wants to travel to his Tuesday art group by bus without a support worker by the end of the year.	15 Dec 2026	In progress	Completed two supported bus trips this fortnight. Noah is now comfortable tapping on and off and reading the timetable.

Choose **Add goal** (1) to record a goal. The table (2) lists each goal with its target date, status and latest progress, and the row menu (3) edits it.

12 Know the Tasks and Goals tabs

In the goal form, **Goal** is required. **Description**, **Target date** and **Progress note** are optional. **Status** is required and starts as **In progress**. The choices are **Not started**, **In progress**, **Achieved** and **On hold**, coloured grey, blue, green and amber. When you edit a goal, the progress note you type replaces the current one, and clearing it removes it.

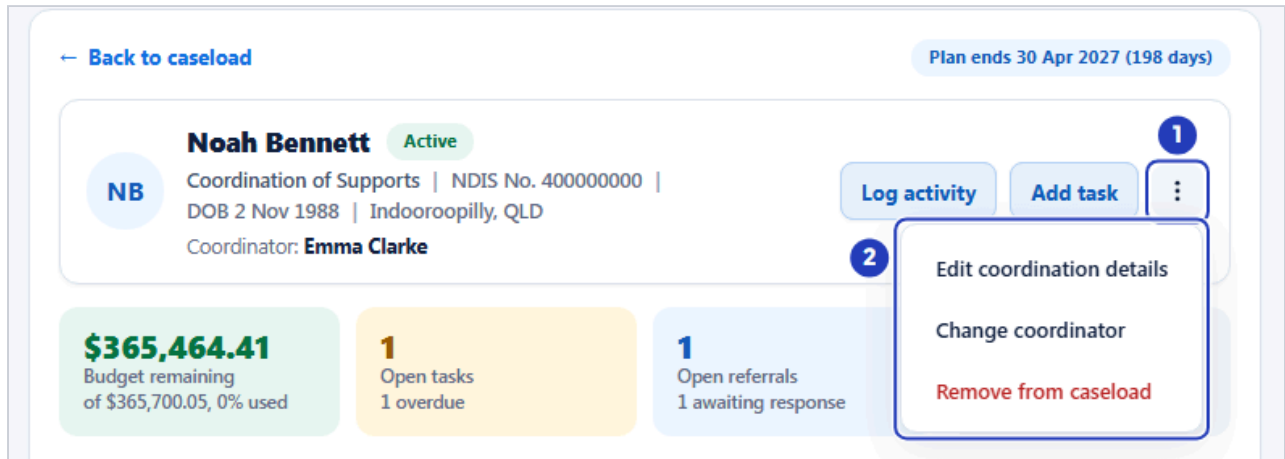
The **Tasks** tab lists each task with its **Task**, **Assigned to**, **Due**, **Priority** and **Status**. Open tasks come first, with the nearest due date at the top. With no tasks it says **No tasks recorded yet** and **Follow-ups for this participant and who is responsible for them appear here**. If you can manage support coordination, an **Add task** button sits under it. A row's three-dot menu has **Edit**, **Mark complete** (or **Reopen** for a finished task) and **Delete**. **Delete** asks you to confirm because it cannot be undone.

Activities, **Referrals** and **Reports** hold the participant's case notes, their referrals to providers and their stored reports. See Log activities, referrals and reports.



13 Open the header menu

- 1 Choose the three-dot button at the right of the header. It shows only when you can manage support coordination.
- 2 The menu lists **Edit coordination details**, **Change coordinator** and **Remove from caseload**.



Choose the three-dot button (1) to open the menu (2) with **Edit coordination details**, **Change coordinator** and **Remove from caseload**.

14 Change the coordinator or remove a participant

Edit coordination details opens a window to change the **Coordinator** and the **Support Coordination level**. The coordinator is required. If the participant already has a level, it is required too. **Save changes** stays greyed out until you change something. A message confirms **Coordination details updated**.

Change coordinator opens the same window with the **Coordinator** field ready to type in.

Unassign coordinator is in that window, under **Need to remove the coordinator without choosing a new one?** A window titled **Unassign coordinator?** asks you to confirm. The participant stays on the caseload with an amber **Unassigned** label until you choose a new coordinator.

Remove from caseload takes the participant off the caseload after you confirm in the window titled **Remove from caseload?** Their activities, tasks, goals, referrals and reports remain available. They leave the list unless **Include inactive** is ticked. For a removed participant the menu shows **Reactivate on caseload** instead.

Each change of coordinator is recorded in **Coordinator history** on the **Plan & Budget** tab.

Important: Removing a participant from the caseload keeps all their records, and **Reactivate on caseload** brings them back.

What happens next

Your changes show straight away in the header tiles, the Overview and the matching tab.

To log case notes, send referrals to providers and create reports, continue with Log activities, referrals and reports.

The budget and the plan dates come from the participant's Service Agreement. To change what is funded, change its line items. See Add line items.



Important notes

Note: The screens in this guide show a demonstration organisation with made-up participants. Your own caseload will show your participants.

Important: The figures in the header and on the Plan & Budget tab are based on the work you record in BondiByte against the participant's Service Agreement. They are not the participant's official NDIS balance, and spending with other providers is not visible here.

Good practice

- Choose the Support Coordination level when you add a participant. It shows on their row, in the header and in their reports.
- Check the amber **Unassigned** label on the caseload often. A participant with no coordinator cannot have activities logged against them.
- Give every task an owner and a due date. The **Open tasks** tile and the **Overdue** label then show what needs attention.
- Look at **Plan remaining** early. The pill turns amber 60 days before the plan ends, which leaves time for the end-of-plan reassessment report.
- Remove a participant from the caseload when you stop coordinating for them, rather than deleting records. Everything stays available.

Troubleshooting

Support Coordination is not in my left menu.

Why it happens: Your role does not include **Can view support coordination**.

What to do: Ask an Owner or Admin to check your role.

I cannot see **Add participant**, **Log activity**, **Add task** or the three-dot menu.

Why it happens: Your role does not include **Can manage support coordination**.

What to do: Ask an Owner or Admin to add that permission to your role.

My caseload is empty.

Why it happens: No participants are assigned to you as their coordinator.

What to do: Choose **All participants**, or ask a manager to assign participants to you.

The person I want is not in the **Participant** list.

Why it happens: Only active clients who are not already on the caseload are listed.

What to do: Tick **Include inactive** to check whether they are already there, then choose **Reactivate on caseload**. If they are not a client yet, create them first. See [Create a client](#).

Budget remaining shows **No funded supports**, or **Plan remaining** shows **No plan**.

Why it happens: The participant has no active Service Agreement with line items, or the funded supports have no end date.

What to do: Open **Manage funded supports** on the **Plan & Budget** tab and check the agreement. See [Create a Service Agreement](#).

Add task is greyed out.

Why it happens: **Task** and **Assigned to** are both required.

What to do: Type the task and choose who it is assigned to.



Questions and answers

Does BondiByte lodge claims with the NDIA?

No. **Download claim CSV** gives you a file to review and lodge through your usual NDIS claiming process.

Need more help?

Guides: bondibyterobotics.com.au/guides | Support: support@bondibyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
Last reviewed 14 October 2026.*